

Original

Statement of Work

Contract Number: EP-W-11-009/ EP-W-11-010/ EP-W-11-011

RFO Number: 44

I. **TITLE: Sustainable Communities Technical Assistance – Local Foods, Local Places (Delta and Western U.S.)**

II. **PERIOD OF PERFORMANCE:**

From: Date of award

To: December 31, 2015

III. **BACKGROUND:**

This Statement of Work (SOW) is intended to expand Environmental Protection Agency (EPA) support for sustainable communities through the Local Foods, Local Places initiative of U.S. Department of Agriculture Rural Development (USDA RD), the EPA, the Appalachian Regional Commission (ARC), and the Delta Regional Authority (DRA). The primary activities under this SOW are the development of a technical assistance tool and the provision of technical assistance to eight communities. At least four of these communities will in the counties and parishes that comprise the service area of the Delta Regional Authority (see <http://www.dra.gov/about-us/eight-state-map.aspx>). A separate Task Order will provide for technical assistance to an additional eight communities, at least four of which will be in Appalachia.

The Local Foods, Local Places initiative is based on USDA's Seven Strategies for Economic Development and the Partnership for Sustainable Communities' Livability Principles. The Local Foods, Local Places technical assistance provided through this SOW is to be modeled on the technical assistance provided through the 2013-2014 USDA-EPA-ARC Sustainable Communities in Appalachia partnership. This technical assistance in Appalachia made use of a Small-Town Appalachian Revitalization tool, a copy of which will be provided to the Contractor.

Selection of the eight recipient communities will take into account level of interest and potential for success in:

- Producing and distributing healthful local food.
- Linking local food systems to the Livability Principles.
- Creating economic opportunities and expanding access to healthful foods among economically disadvantaged members of the community.
- Bringing together partners in business, government, education, and other relevant organizations, including local agricultural producers.

Special consideration will be given in the selection process to communities that are in the early

10/10/10

stages of developing or restoring local food enterprise and creating livable, vibrant neighborhoods.

IV. PURPOSE AND OBJECTIVES:

The purpose of this task order is to expand sustainable communities approaches with a focus on local food enterprise and place-based economic development. The objectives of this task order are to develop a Local Foods, Local Places tool and to provide technical assistance to eight communities.

V. QUALITY ASSURANCE (QA) REQUIREMENTS:

Check

☐ YES if the following is required or

☒ NO if the following is not required.

The Contractor shall submit with their technical proposal a written Quality Assurance Project Plan for any project that is developing environmental measurements or a Quality Assurance Supplement to the Quality Management Plan for any project which generates environmental data using models.

VI. TASKS AND DELIVERABLES:

The Task Order Contracting Officer Representative (TO COR) shall review all deliverables in draft form and provide revisions or comments to the Contractor. The Contractor shall incorporate the TO COR's comments as specified below. Final deliverable shall be in Microsoft Word or other appropriate electronic format.

Contractor personnel shall at all times identify themselves as contractor employees and shall not present themselves as EPA employees. Furthermore, they shall not represent the views of the U.S. Government, EPA, or its employees. In addition, the Contractor shall not engage in inherently governmental activities, including but not limited to actual determination of EPA policy and preparation of documents on EPA letterhead.

Task One – Manage the Project and Develop Schedule

(Contract Reference: II.B. TECHNICAL ASSISTANCE Page 1-17 of 27)

To manage the project, the Contractor shall organize and conduct conference calls among Contractor team members, the TO COR, and other appropriate representatives of USDA RD, EPA, and DRA. At a minimum, the set of conference calls shall include:

- Two two-hour calls at the onset of the project to discuss the objectives, management, and schedule of the project;
- A weekly call to review progress; and
- Following the completion of technical assistance in all eight communities, one two-hour call to consider lessons learned.

Within 14 days of executing the task order, the Contractor shall deliver to EPA a project schedule that includes:

- The project management conference calls;
- Development of the Local Foods, Local Places (Delta and Western U.S.) tool; and,
- Delivery of technical assistance to the eight selected communities.

The Contractor shall update the schedule as appropriate throughout the project.

Task Two – Develop the Local Foods, Local Places (Delta and Western U.S.) Tool
(Contract Reference: II.B. TECHNICAL ASSISTANCE Page 1-17 of 27)

The Contractor, in consultation with the TO COR, shall develop the Local Foods, Local Places (Delta and Western U.S.) tool in a format appropriate for delivery in the site visits described in Task Three.

The Local Foods, Local Places (Delta and Western U.S.) tool shall be based on the 2013-2014 Small-Town Appalachian Revitalization Tool and shall include:

- Sample site visit schedule, agenda, and participation list
- Sample invitations to participate in site visit meetings
- Sample presentations on local food enterprise and livable communities approaches with speaker notes as appropriate
- Sample maps
- Sample case studies and examples of best practices that involve both local food enterprises and livable communities approaches
- Sample interactive exercises to facilitate discussions among participating community members with notes for facilitator as appropriate
- Sample concluding presentation with speaker notes as appropriate

A draft of a Local Foods, Local Places (Delta and Western U.S.) tool shall be provided to EPA at least 21 days prior to the first site visit. EPA, in consultation with USDA-RD, will respond and provide comments within 7 days of receipt. Final draft materials shall be provided to EPA at least 7 days prior to the first scheduled site visit.

Task Three – Deliver Technical Assistance
(Contract Reference: II.B. TECHNICAL ASSISTANCE Page 1-17 of 27)

The primary delivery mechanism for the technical assistance shall be via a two day-site visit, typically taking place over consecutive days.

In advance of the site visit, the Contractor shall organize and conduct at least three conference calls with appropriate community representatives, as identified by the Contractor in consultation with USDA RD and EPA. The purpose of these conference calls is to gather information on community goals and on local factors, plan the agenda and arrangement for the site visit, and otherwise work to ensure the successful delivery of the Local Foods, Local Places technical assistance tool.

Each site visit shall include the meetings and activities of the Local Foods, Local Places tool. The Contractor shall facilitate these meetings and activities, including by making presentations and facilitating interactive group work as needed.

The Contractor, in consultation with USDA RD and EPA, shall offer the community guidance on who should participate in one or more aspects of the site visit, including elected officials, local government staff, local business owners and investors, local or state USDA RD staff, local agricultural producers, and members of the community. USDA, DRA, EPA, HUD and DOT staff from headquarters or regional offices shall also be welcomed to join in site visits as appropriate.

For each of the eight communities, the sample materials of the Local Foods, Local Places tool shall be modified as appropriate to reflect the particular circumstances of the community, and shall include aspects of local data or information analysis and case studies that as best as possible reflect challenges and opportunities of the community.

Scheduling should typically allow for at least two weeks between site visits.

Upon completion of the site visit or visits for each community, the Contractor shall develop a next steps memo to EPA of no more than eight pages in length that documents highlights of the community discussions during the site visit and details actions the community could take. These next steps memos, which can be referred to as community action plans, shall draw on the format and types of information included in the action plans developed under the 2012 Sustainable Communities in Appalachia technical assistance program, available at http://www.arc.gov/news/article.asp?ARTICLE_ID=408.

The Contractor shall provide the next steps memo to EPA within seven days following the conclusion of each site visit. EPA, working with USDA RD and, as appropriate, DRA, will respond with comments within seven days, after which time a final draft shall be delivered to USDA RD and EPA within seven days. The Contractor shall deliver a total of eight next steps memos under this task.

During the two-month period following the site visit or visits, the Contractor shall conduct at least three conference calls (each call of up to one-and-a half hours) with appropriate community representatives from each of the eight communities to consult on next steps and implementation strategies. The Contractor shall invite EPA, USDA, and, as appropriate, DRA to participate in these post-visit conference calls. These calls should include consideration of USDA RD and other federal sources of funding that may be available for implementation of action plans. The calls will also include consideration of local policies and programs, and other potential sources of investment and support for implementation, including from the philanthropic community.

Note that the Delta Regional Authority plans to make funding available for the implementation of projects in the communities that are in the counties and parishes that comprise the service area of the Delta Regional Authority (see <http://www.dra.gov/about-us/eight-state-map.aspx>).

VII. SCHEDULE FOR DELIVERABLES:

The Contractor shall provide the following specific deliverables to the EPA TO COR:

<u>TASK</u>	<u>DELIVERABLE</u>	<u>FORM AND QUANTITY</u>	<u>DATE DUE</u>
1	Schedule for Implementation	Excel Spreadsheet, updated regularly	Within 14 days of executing task order.
2	Local Foods, Local Places (Delta and Western U.S.) Tool	Microsoft Office files, Google Earth files or Adobe Acrobat files, as appropriate.	Draft materials within 21 days prior to first site visit, final 7 days prior to first site visit.
3	Deliver Technical Assistance to Selected Communities	Site visit	TBD
3	Community Action Plan	Next steps and lessons learned memos	Draft within 7 days of each site visit, final within 7 days of receiving EPA's comments.

VIII. MISCELLANEOUS

Software Application files, delivered to the Government, shall conform to the requirements relating to accessibility as detailed to the 1998 amendments to the Rehabilitation Act, particularly, but not limited to, § 1194.21 Software applications and operating systems and § 1194.22 Web-based intranet and internet information and applications. See: <http://www.section508.gov/>

Preferred text format:

MS Word, single-spacing, 12 point font.

Documents shall adhere to the EPA/Office of Sustainable Communities Style Guide, (See Attachment 1)

Preferred presentation format:

Power Point, Microsoft Office

Preferred portable format:

Adobe Acrobat

Statement of Work

Contract Number: EP-W-11-009/ EP-W-11-010/ EP-W-11-011

Task Order Number: 0045

I. TITLE: Sustainable Communities Technical Assistance – Local Foods, Local Places (Appalachia and Eastern U.S.)

II. PERIOD OF PERFORMANCE:

From: Date of award

To: December 31, 2015

III. BACKGROUND:

This Statement of Work (SOW) is intended to expand Environmental Protection Agency (EPA) support for sustainable communities through the Local Foods, Local Places initiative of U.S. Department of Agriculture Rural Development (USDA RD), the EPA, the Appalachian Regional Commission (ARC), and the Delta Regional Authority (DRA). The primary activities under this SOW are the development of a technical assistance tool and the provision of technical assistance to twelve communities. These twelve communities will be east of the Mississippi River, with at least six of them in the Appalachian region. A separate Task Order will provide for technical assistance to an additional twelve communities in the Delta region or in areas west of the Mississippi River.

The Local Foods, Local Places initiative is based on USDA's Seven Strategies for Economic Development and the Partnership for Sustainable Communities' Livability Principles. The Local Foods, Local Places technical assistance provided through this SOW is to be modeled on the technical assistance provided through the 2013-2014 USDA-EPA-ARC Sustainable Communities in Appalachia partnership. This technical assistance in Appalachia made use of a Small-Town Appalachian Revitalization tool, a copy of which will be provided to the Contractor.

Selection of the twelve recipient communities will take into account level of interest and potential for success in:

- Producing and distributing healthful local food.
- Linking local food systems to the Livability Principles.
- Creating economic opportunities and expanding access to healthful foods among economically disadvantaged members of the community.
- Bringing together partners in business, government, education, and other relevant organizations, including local agricultural producers.

Special consideration will be given in the selection process to communities that are in the early stages of developing or restoring local food enterprise and creating livable, vibrant neighborhoods.

IV. PURPOSE AND OBJECTIVES:

The purpose of this task order is to expand sustainable communities approaches with a focus on local food enterprise and place-based economic development. The objectives of this task order are to develop a Local Foods, Local Places tool and to provide technical assistance to twelve communities.

V. QUALITY ASSURANCE (QA) REQUIREMENTS:

Check

☐ YES if the following is required or

☒ NO if the following is not required.

The Contractor shall submit with their technical proposal a written Quality Assurance Project Plan for any project that is developing environmental measurements or a Quality Assurance Supplement to the Quality Management Plan for any project which generates environmental data using models.

VI. TASKS AND DELIVERABLES:

The Task Order Contracting Officer Representative (TO COR) shall review all deliverables in draft form and provide revisions or comments to the Contractor. The Contractor shall incorporate the TO COR's comments as specified below. Final deliverable shall be in Microsoft Word or other appropriate electronic format.

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Task One –Manage the Project and Develop Schedule

(Contract Reference: II.B. TECHNICAL ASSISTANCE Page 1-17 of 27)

To manage the project, the Contractor shall organize and conduct conference calls among Contractor team members, the TO COR, and other appropriate representatives of USDA RD, EPA, and ARC. At a minimum, the set of conference calls shall include:

- Two two-hour calls at the onset of the project to discuss the objectives, management, and schedule of the project;
- A weekly call to review progress; and
- Following the completion of technical assistance in all twelve communities, one two-hour call to consider lessons learned.

Within 14 days of executing the task order, the Contractor shall deliver to EPA a project schedule that includes:

- The project management conference calls;
- Development of the Local Foods, Local Places (Appalachia and Eastern U.S.) tool; and,
- Delivery of technical assistance to the twelve selected communities.

The Contractor shall update the schedule as appropriate throughout the project.

Task Two – Develop the Local Foods, Local Places (Appalachia and Eastern U.S.) Tool
(Contract Reference: II.B. TECHNICAL ASSISTANCE Page 1-17 of 27)

The Contractor, in consultation with the TO COR, shall develop the Local Foods, Local Places (Appalachia and Eastern U.S.) tool in a format appropriate for delivery in the site visits described in Task Three.

The Local Foods, Local Places (Appalachia and Eastern U.S.) tool shall be based on the 2013-2014 Small-Town Appalachian Revitalization Tool and shall include:

- Sample site visit schedule, agenda, and participation list
- Sample invitations to participate in site visit meetings
- Sample presentations on local food enterprise and livable communities approaches with speaker notes as appropriate
- Sample maps
- Sample case studies and examples of best practices that involve both local food enterprises and livable communities approaches
- Sample interactive exercises to facilitate discussions among participating community members with notes for facilitator as appropriate
- Sample concluding presentation with speaker notes as appropriate

A draft of a Local Foods, Local Places (Appalachia and Eastern U.S.) tool shall be provided to EPA at least 21 days prior to the first site visit. EPA, in consultation with USDA-RD, will respond and provide comments within seven (7) days of receipt. Final draft materials shall be provided to EPA at least seven (7) days prior to the first scheduled site visit.

Task Three – Deliver Technical Assistance
(Contract Reference: II.B. TECHNICAL ASSISTANCE Page 1-17 of 27)

The primary delivery mechanism for the technical assistance shall be via a two day-site visit, typically taking place over consecutive days.

In advance of the site visit, the Contractor shall organize and conduct at least three conference calls with appropriate community representatives, as identified by the Contractor in consultation with USDA RD and EPA. The purpose of these conference calls is to gather information on community goals and on local factors, plan the agenda and arrangement for the site visit, and otherwise work to ensure the successful delivery of the Local Foods, Local Places technical assistance tool.

Each site visit shall include the meetings and activities of the Local Foods, Local Places tool. The Contractor shall facilitate these meetings and activities, including by making presentations and facilitating interactive group work as needed.

The Contractor, in consultation with USDA RD and EPA, shall offer the community guidance on who should participate in one or more aspects of the site visit, including elected officials, local government staff, local business owners and investors, local or state USDA RD staff, local agricultural producers, and members of the community. USDA, ARC, EPA, HUD and DOT staff from headquarters or regional offices shall also be welcomed to join in site visits as appropriate.

For each of the twelve communities, the sample materials of the Local Foods, Local Places tool shall be modified as appropriate to reflect the particular circumstances of the community, and shall include aspects of local data or information analysis and case studies that as best as possible reflect challenges and opportunities of the community.

Scheduling should typically allow for at least two weeks between site visits.

Upon completion of the site visit or visits for each community, the Contractor shall develop a next steps memo to EPA of no more than eight pages in length that documents highlights of the community discussions during the site visit and details actions the community could take. These next steps memos, which can be referred to as community action plans, shall draw on the format and types of information included in the action plans developed under the 2012 Sustainable Communities in Appalachia technical assistance program, available at http://www.arc.gov/news/article.asp?ARTICLE_ID=408.

The Contractor shall provide the next steps memo to EPA within seven days following the conclusion of each site visit. EPA, working with USDA RD and, as appropriate, ARC, will respond with comments within seven days, after which time a final draft shall be delivered to USDA RD and EPA within seven days. The Contractor shall deliver a total of twelve next steps memos under this task.

During the two-month period following the site visit or visits, the Contractor shall conduct at least three conference calls (each call of up to one-and-a half hours) with appropriate community representatives from each of the twelve communities to consult on next steps and implementation strategies. The Contractor shall invite EPA, USDA, and, as appropriate, ARC to participate in these post-visit conference calls. These calls should include consideration of USDA RD and other federal sources of funding that may be available for implementation of action plans. The calls will also include consideration of local policies and programs, and other potential sources of investment and support for implementation, including from the philanthropic community.

Note that the Appalachian Regional Commission plans to make funding available for the implementation of projects identified by those communities that are in the Appalachian region.

VII. SCHEDULE FOR DELIVERABLES:

The Contractor shall provide the following specific deliverables to the EPA TO COR:

<u>TASK</u>	<u>DELIVERABLE</u>	<u>FORM AND QUANTITY</u>	<u>DATE DUE</u>

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3	Deliver Technical Assistance to Selected Communities	Site visit	TBD
3	Community Action Plan	Next steps and lessons learned memos	Draft within 7 days of each site visit, final within 7 days of receiving EPA's comments.

VIII. MISCELLANEOUS

Software Application files, delivered to the Government, shall conform to the requirements relating to accessibility as detailed to the 1998 amendments to the Rehabilitation Act, particularly, but not limited to, § 1194.21 Software applications and operating systems and § 1194.22 Web-based intranet and internet information and applications. See: <http://www.section508.gov/>

Preferred text format:

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Documents shall adhere to the EPA/Office of Sustainable Communities Style Guide, (See Attachment 1)

Preferred presentation format:

Power Point, Microsoft Office

Preferred portable format:

Adobe Acrobat

Statement of Work
Contract Number: EP-W-11-009/EP-W-11-010/EP-W-11-011
RFO Number: 0049

I. **TITLE: Technical Assistance and Guidance Development for Vacant Lot Treatment Specifications, Genesee County Land Bank (Flint MI)**

II. **PERIOD OF PERFORMANCE:**

From: Date of Award

To: December 31, 2015

III. **BACKGROUND:**

The US Environmental Protection Agency (EPA), Office of Sustainable Communities (OSC) and Region 5, provides tools and technical assistance to help communities build capacity to support smart growth, revitalize real properties and communities to improve economic, environmental outcomes, and social benefits, and raise awareness among community and government leaders of the relationship between development decisions and their impact on environmental quality (air, water, and land).

Flint, Michigan, is a participant city in the White House Strong Cities, Strong Communities (SC2) Initiative. Through the SC2 Initiative, selected cities receive technical assistance from federal partners to support locally driven economic development efforts. As part of the SC2 effort, the city of Flint and the Genesee County Land Bank are partnering to support reuse of vacant and abandoned properties.

The Genesee County Land Bank in Flint is a government organization that manages vacant and abandoned tax-foreclosed properties in Genesee County, and works to put these properties back into productive use. This includes selling and renting our properties, managing blight, greening, and revitalizing the neighborhoods that surround our properties. As of October 2014, the Land Bank owned approximately 9,000 properties, about half residential. The Genesee County Land Bank in Flint, MI is moving forward with a large scale residential property demolition program that will clear vacant, abandoned, and blighted property from neighborhoods to allow for stabilization, and eventually, revitalization.

The Land Bank and City are interested in increasing the reuse of vacant and abandoned properties within blighted neighborhoods as green space. In Flint and elsewhere, there may be visions or renderings of greener lots, but the details from those renderings are largely missing. To further their efforts, the City has requested technical assistance for site finishing/landscape design following building demolitions. Site finishing (e.g. landscape design) refers to the period following building removal when a site or property is prepared for the reuse. This may involve grading or planting the site, and can support reuse that is environmentally beneficial, maintains the surrounding community character,

and prepares the properties for future beneficial reuses in manners outlined in the local land use plan.

The contractor shall provide technical assistance to communities for site finishing that includes specification about soils, grading, plant types, installation, watering, and maintenance. Site designs need to be low tech, low cost, and replicable at scale. By providing technical assistance to the Land Bank on vacant lot treatments, Flint and Genessee County will gain tools that directly support their work in vacant lot management, environmental protection, and economic and social development.

Because many other communities are managing large numbers of vacant lots, the technical assistance products developed under this contract will be useful to other cities. The contractor shall take lessons learned and technical assistance products to develop content for guidance in site finishing for other communities. EPA will provide an inventory of approximately ten (10) case studies that illustrate how other cities design vacant lot treatments. EPA will also provide information on financial tools and resources for communities. Available case studies and financial assistance information will be provided to the contractor as a resource in May 2015.

III. PURPOSE AND OBJECTIVE:

The purpose of this Task Order is to support Goal 3 of the USEPA Strategic Plan "Cleaning up Communities and Advancing Sustainable Communities." Specifically it supports the Strategic Plan objective: "Support sustainable, resilient, and livable communities by working with local, state, tribal, and federal partners to promote smart growth, emergency preparedness and recovery planning, redevelopment and reuse of contaminated and formerly contaminated sites, and the equitable distribution of environmental benefits."

The objectives of the Task Order are 1) to provide direct technical assistance to Flint/Genessee County for site finishing on vacant lots where structures have been demolished, and 2) to share lessons learned with other communities managing large numbers of vacant properties while simultaneously working to achieve environmental, economic, and social goals/environmental justice in the community.

Task details are provided in Section V.

IV. QUALITY ASSURANCE (QA) REQUIREMENTS:

Check [] Yes if the following is required or [X] NO if the following is not required. The Contractor shall submit with their technical proposal a written Quality Assurance Project Plan for any project that is developing environmental measurements or a Quality Assurance Supplement to the Quality Management Plan for any project which generates environmental data using models.

V. TASKS AND DELIVERABLES:

The Task Order Project Officer (TOPO) will review all deliverables in draft form and provide revisions and/or comments to the contractor. The contractor shall prepare the final deliverables incorporating the TOPO's comments. Contractor shall provide the TOPO with copies of all deliverables as requested in the Task Order.

Contractor personnel shall at all times identify themselves as Contractor employees and shall not present themselves as EPA employees. Furthermore, they shall not represent the views of the U.S. Government, EPA, or its employees. In addition, the Contractor shall not engage in inherently governmental activities, including but not limited to actual determination of EPA policy and preparation of documents on EPA letterhead.

Task 1: Technical Assistance to Genessee County Land Bank - Vacant Lot Landscape Designs

(Contract Page 17 of 27; II. B. Technical Assistance)

EPA OSC and Region 5 seek contractor assistance for the development of model landscape designs for use by Genessee County Land Bank on vacant sites where buildings have been demolished. The contractor shall specify the materials and construction/execution practices needed for five (5) types of model vacant lot finishes. The treatment types shall include the following, unless otherwise specified by the TOPO:

1. **Residential corner lot-** Demolition sites that are situated on a corner lot in a traditional residential neighborhood setting. A cluster of three (3) or more trees mulched and near the center of the lot that also allow for angular cross through foot traffic on the lot.
2. **Residential mid-block lot-** Demolition sites that are situated mid-block in a traditional residential neighborhood setting. A cluster of three (3) or more trees mulched and near the center of the lot.
3. **Commercial corridor-** Demolition sites that are along commercial corridors, typically larger than residential lots, trees planted and mulched near the street in a row.
4. **Open space areas-** Demolition sites in neighborhoods transitioning from former residential areas to non-residential use in Imagine Flint Master Plan. A denser tree planting that still allows for visibility through the site.
5. **Wildflower open space areas-** Demolition sites in neighborhoods transitioning from former residential areas to non-residential use in the Imagine Flint Master Plan. A denser tree planting that still allows for visibility through the site. The

back quarter of the lot would be planted in a wildflower mix to enhance the natural area while keeping a maintained look near the front of the lot.

Other Site Specification:

- All demolition sites will also be covered with a Dutch white clover as a groundcover as is currently in the demolition specification, unless otherwise specified by TOPO. This low growing groundcover minimizes maintenance and provides the look of a maintained area at 12" plant height.
- All sites meet the standards of Crime Prevention through Environmental Design (CPTED) maintaining clear site distances throughout the site from the street, unless otherwise specified by TOPO.
- Trees should be suitable for Flint, Michigan climate (e.g. USDA hardiness zone 5) and appropriate for the sites.

The model documentation shall meet the following criteria listed below:

- Be written in style and format commonly used by localities when bidding out contracts for landscape design.
- Use industry standard specification language to list the materials and execution steps necessary.
- Identify treatments that are low tech, low cost, and low maintenance. Designs should be replicable and able to be implemented by traditional landscape or demolition contractor.
- List material selection, including plant types, soil, and any additional soft/hardscape.
- Provide execution details including installation instructions such as grading, compaction, drainage, and schedule/timing. Execution details also include watering regimen and first year maintenance.
- Provide the calculated material cost of implementation as part of a residential demolition or as a standalone vacant lot treatment.
- Provide written legal disclaimer that this is model language only.

Each model design specification shall be two (2) – five (5) pages in length.

The TOPO and contractor shall hold an initial kick-off meeting with USEPA Region 5, the Genessee County Land Bank, and others identified by the TOPO within two (2) weeks of task order award to define how often to meet and logistics for contractor collaboration with the Genessee County Land Bank. The TOPO, contractor, and others

invited by the TOPO will meet by phone regularly (bi-weekly unless otherwise specified by TOPO). The contractor shall complete one (1) site visit with TOPO or TOPO designee on dates mutually agreed upon by contractor and TOPO.

The draft model specifications shall be provided to the TOPO for review by April 23, 2015. The TOPO will gather and provide comments from partners and EPA and provide to contractor within one (1) week. Contractor will complete revisions within two (2) weeks, unless TOPO expands contractor revision period. The goal is to provide technical assistance to the community in time for use in Spring site activities.

Task 2: Description of Community Context for the Model Vacant Lot Treatments
(Contract Page 17 of 27; II. B. Technical Assistance)

In the process of development of the model landscape designs, the contractor shall analyze how each vacant lot option may be implemented within different community contexts. The TOPO, contractor, and others invited by the TOPO will share local information with the contractor in the regular phone meetings in Task 1.

For example, vacant lots in “green zones” may be suited to a wide variety of treatments, including intensive tree planting and stormwater management. Vacant lots in “market ready” zones may be best designed with an interim design in anticipation of future redevelopment. A Master Plan and zoning update have already identified 13 place types within Flint and may include much of this information. The contractor shall identify the “places” or zones that are best suited for each vacant lot type. The contractor shall create a table/document that illustrates the districts and lots types that are most appropriate for each treatment. The contractor shall deliver the draft document three (3) months after award.

Task 3: Final report
(Contract Page 12 of 27; II. A.2. Development and Analysis of Policy Options)

The contractor shall develop content for a user-friendly guide that briefly introduces the challenges in cities like Flint in dealing with vacant lots, then specifically discusses issues associated with site finishing/landscape design, and explains practical approaches for site finishing. The purpose is to provide useful information on site finishing to other communities managing large numbers of vacant properties by sharing the lessons learned in Flint/Genessee County. The text prepared by contractor will be approximately ten (10) to fifteen (15) pages in length, excluding attachments discussed below.

The report shall:

- Illustrate how activities in Flint are replicable in other cities.
- Describe the logic behind selection of place based vacant lot treatments.
- Provide a brief summary of proposed vacant lot concepts that were not adopted and discuss pros and cons of those concepts.

- Include EPA-researched case studies on other city efforts in an Appendix or in the report (to be provided by EPA by May 2015).
- Include Funding Opportunities (to be provided by EPA by May 2015).
- Include model language for vacant lot treatments developed under Task 1
- Discuss relationship to environmental management issues (e.g. storm water management and water quality, local air quality, local ecological benefits) as well as economic and community livability issues.

The draft report is due six (6) months after award and the final report is due eight (8) weeks after receipt of comments from the TOPO.

VI. SCHEDULE FOR DELIVERABLES:

The contractor shall provide the following specific deliverables to the EPA TOPO:

	DELIVERABLE	FORM AND QUANTITY	SCHEDULE
Task 1:	Model language: Bid-ready documentation vacant lot treatments	Five (5); MS word, electronic copy	-Draft due April 23, 2015 -EPA comments to contractor within one (1) week -Final document two (2) weeks after receipt of EPA comments
Task 2:	Table or other document showing place based selection of vacant lot treatments	One (1)	-Draft due three (3) months after award -EPA comments to contractor within three (3) weeks -Final document three (3) weeks after receipt of EPA comments
Task 3:	Final Report	One (1)	-Draft due six (6) months after award -EPA comments to contractor eight (8) weeks after -Final document eight (8) weeks after receipt of EPA comments

Statement of Work

Contract Number: EP-W-11-009/ EP-W-11-010/ EP-W-11-011

RFO Number: 52

- I. TITLE: Sustainable Communities Technical Assistance – Blackstone Virginia/Nottoway County**
- II. PERIOD OF PERFORMANCE:**

From: Date of award

To: December 31, 2015

III. BACKGROUND:

This Statement of Work (SOW) is intended to expand Environmental Protection Agency (EPA) support for sustainable community planning and smart growth through the Office of Sustainable Communities (OSC)-General Services Administration (GSA) interagency agreement dated September 30, 2014. The primary activities under this SOW are the provision of Smart Growth planning assistance to the Town of Blackstone, Virginia and Nottoway County, and the development of smart growth technical assistance materials that could be used in other communities across the US that have significant new Federal or State facility investments similar to the Department of State's Foreign Affairs Security Training Center (FASTC) project at Fort Pickett in Nottoway County.

This work is part of a larger pilot technical assistance program being launched this year between GSA and EPA. The intent behind the three (3) initial areas of work is to bring the Partnership for Sustainable Communities' Livability Principles into the core facilities investments GSA oversees.

IV. PURPOSE AND OBJECTIVES:

The broad goal of this task order is to incorporate smart growth and sustainable community approaches into communities' efforts to generate better environmental, economic and quality of life outcomes from Federal facility investments. In this specific case, the task order will provide technical assistance to the Town of Blackstone, Virginia and Nottoway County. It will also produce materials that can be used in other communities with similar Federal facility investments.

EPA and GSA have partnered with the Town of Blackstone, Nottoway County and the Virginia Economic Development Partnership to provide planning assistance aimed at better leveraging the economic activity generated by a new Federal facility. In particular, the work will create a shared vision for how the new State Department training facility can help support an economically vibrant downtown for the Town of Blackstone, and generate a broad range of benefits for the Nottoway County. The Assistance will explore innovative strategies, including incentives and

policies employed in other communities to identify those that may assist Blackstone and Nottoway County in deriving the greatest benefit possible from the new Federal investment at FASTC.

V. QUALITY ASSURANCE (QA) REQUIREMENTS:

Check

☐ YES if the following is required or

☒ NO if the following is not required.

The Contractor shall submit with their technical proposal a written Quality Assurance Project Plan for any project that is developing environmental measurements or a Quality Assurance Supplement to the Quality Management Plan for any project which generates environmental data using models.

VI. TASKS AND DELIVERABLES:

The Task Order Contracting Officer Representative (TO COR) shall review all deliverables in draft form and provide revisions or comments to the Contractor. The Contractor shall incorporate the TO COR's comments as specified below. Final deliverable shall be in Microsoft Word or other appropriate electronic format.

Contractor personnel shall at all times identify themselves as contractor employees and shall not present themselves as EPA or GSA employees. Furthermore, they shall not represent the views of the U.S. Government, EPA, GSA, or its employees. In addition, the Contractor shall not engage in inherently governmental activities, including but not limited to actual determination of EPA policy and preparation of documents on EPA letterhead.

Task One –Manage the Project and Develop Schedule

(Contract Reference: II.B. TECHNICAL ASSISTANCE Page 1-17 of 27)

The Contractor shall organize and conduct conference calls among team members, the TO COR, and other appropriate representatives of GSA, EPA, and a select group of local partners identified by GSA (hereafter referred to as the "local working group"). The calls shall include:

- One (1) ninety (90) minute call at the onset of the project with EPA and GSA staff to discuss the objectives, management, and schedule of the project.
- Up to three (3) ninety (90) minute conference calls with the local working group, and EPA and GSA staff in advance of the On-site Workshop (Task Three). The Contractor shall schedule and facilitate the calls. The purpose of these conference calls is to gather information on community goals and on local factors; review the draft set of strategies to leverage Federal investments (Task Two); and to plan the agenda and arrangement for the on-site workshop.
- One (1) two (2) hour conference call with the local working group, and EPA and GSA

staff upon receipt of the draft Next Steps Memo (Task Four).

- Up to three (3) one (1) hour calls during the duration of the project to check in on progress.

Within 14 days of executing the task order, the Contractor shall deliver to EPA a project schedule that includes all tasks listed in this scope of work. The Contractor shall update the schedule as appropriate throughout the project.

Task Two – Develop Set of Strategies to Leverage Federal Facility investments.
(Contract Reference: ILB. TECHNICAL ASSISTANCE Page 1-17 of 27)

The Contractor, in consultation with the TO COR, shall develop a set of strategies that will help the Town of Blackstone and Nottoway County to evaluate how to best leverage Federal facility investments to best match their economic, environmental and quality of life values. These resources will be drawn primarily from the exercises, case examples, policy inventories and presentation material from existing EPA tools that cover similar issues, namely the Preferred Growth Area Building Blocks; the Sustainable Small Towns and Rural Areas Building Blocks tool; and the Sustainable Communities in Appalachia Assistance program. EPA shall provide the contractor with this material.

These strategies will be the basis for technical assistance delivery during the On-site Workshop described in Task Three.

The contractor shall provide EPA with a draft set of strategies at least 14 days prior to the first site visit. EPA, in consultation with GSA, will respond and provide comments within seven (7) days of receipt.

A final set of strategies shall be refined during the On-site Workshop (Task Three), and will be included in the Next Steps Memo (Task Four).

Task Three – On-site Workshop
(Contract Reference: ILB. TECHNICAL ASSISTANCE Page 1-17 of 27)

The primary delivery mechanism for the technical assistance shall be via a three (3) day on-site workshop that will take place over consecutive days. The on-site workshop shall occur within ten (10) weeks of the execution of the Task Order.

The local working group shall be responsible for arranging the appropriate venue and related logistics such as seating, microphones, projectors, refreshments, invitations, etc.

The On-site Workshop will have three (3) major components:

1. The contractor shall visit and evaluate no more than three (3) existing sites in the Town of Blackstone and the County of Nottoway where commercial or residential development might occur due to the economic activity generated by the new Federal facility. The sites will be selected by the local working group in consultation with GSA staff.
 - o The methodology for the site evaluation will be drawn from materials that

support EPA's Preferred Growth Area Building Blocks tool. For example, a sample base map; cards that prompt participants to examine community values; and opportunities and barriers related to the specific sites.

- o Where available, the local working group will provide the Contractor with information on public sector infrastructure (roads, sewers, etc) costs that would be required to enable future growth on the specific sites.
2. Building upon the vision that emerges from the previous discussion, the Contractor shall refine the set of strategies developed in Task Two, and examine the range of economic development, community design and land use policy strategies that can help the Town and County get the best possible outcomes from a new Federal facility. These refined strategies will be included in the Next Steps Memo (Task Four). The strategies will be categorized as near-, mid-, and long-term actions that can be taken by the Town and County.
 3. During the workshop the Contractor shall organize and facilitate a session about potential funding sources (Federal, State, local, philanthropic, etc) that the local working group could pursue to support further community development around the sites selected for examination.

The Contractor, in consultation with GSA and EPA staff, shall provide the community guidance on who should participate in one (1) or more aspects of the on-site workshop, including elected officials, local government staff, local business owners and investors, GSA staff, State USDA Rural Development staff and members of the community.

Task Four – Next Steps Memo

(Contract Reference: ILB. TECHNICAL ASSISTANCE Page 1-17 of 27)

Upon completion of the on-site workshop, the Contractor shall develop a Next Steps Memo of no more than 20 pages in length that documents highlights of the community discussions during the workshop and details near-term, mid-term and long-term strategies and actions the Town and County could undertake.

The Contractor shall provide EPA with a draft Next Steps Memo within 14 days following the conclusion of the on-site workshop. EPA, will respond with comments within seven (7) days.

The Contractor shall provide EPA with a final Next Steps Memo within seven (7) days of receipt of comments on the draft memo.

VII. SCHEDULE FOR DELIVERABLES:

The Contractor shall provide the following specific deliverables to the EPA TO COR:

<u>TASK</u>	<u>DELIVERABLE</u>	<u>FORM AND QUANTITY</u>	<u>DATE DUE</u>

1	Project Schedule and conference calls	Excel Spreadsheet, updated regularly; conference calls	Project schedule within 14 days of executing Task Order.
2	Draft set of strategies for communities preparing for major new Federal facility investments	Microsoft Office files, Google Earth files or Adobe Acrobat files, as appropriate.	Draft materials within 14 days prior to first site visit.
3	On-Site Workshop	On-site Workshop	Scheduled within ten (10) weeks following execution of the Task Order.
4	Next Steps Memo	Microsoft Office files	Draft within fourteen (14) days of the on-site visit; final within seven (7) days of receiving EPA's comments.

VIII. MISCELLANEOUS

Software Application files, delivered to the Government, shall conform to the requirements relating to accessibility as detailed to the 1998 amendments to the Rehabilitation Act, particularly, but not limited to, § 1194.21 Software applications and operating systems and § 1194.22 Web-based intranet and internet information and applications. See: <http://www.section508.gov/>

Preferred text format:

MS Word, single-spacing, 12 point font.

Documents shall adhere to the EPA/Office of Sustainable Communities Style Guide

Preferred presentation format:

Power Point, Microsoft Office

Preferred portable format:

Adobe Acrobat

Statement of Work

Contract Number: EP-W-11-009

RFO Number: #0055

I. TITLE: Building Blocks for Sustainable Communities Technical Assistance in 20 Making a Visible Difference EPA Regional Priority Communities

II. PERIOD OF PERFORMANCE:

From: Date of award

To: Approximately 12 months after date of award

BACKGROUND: This Statement of Work (SOW) will provide contractor support to EPA as it continues the expansion of its Building Blocks for Sustainable Communities program to 20 regional priority communities around the country through the Making a Visible Difference effort. These communities are selected by the ten EPA regional offices (two communities/office). This work is part of a larger agency-wide effort to focus EPA and federal resources on 50 communities around the country (five in each EPA region) as part of the Making a Visible Difference (MVD) initiative. MVD is part of the FY-15 Action Plan for the Community Cross-Agency Strategy to help target EPA discretionary dollars and other federal investments—particularly from HUD, DOT and USDA—to improve environmental, public health and economic outcomes in those places. These target communities are predominately low-capacity and underserved communities and the work will focus on the agency-wide priorities of mitigating the effects of climate change, promoting green infrastructure, and encouraging equitable development. Regions will capitalize on the regional partnerships built in these areas to bring additional dollars from all community-based programs within EPA, and from EPA's federal partners.

The building blocks program, launched in March of 2011, is a critical element of the EPA Office of Sustainable Communities' (OSC) efforts to transform its technical assistance work. Beginning in 2005, EPA began to provide direct technical assistance to communities through the Smart Growth Implementation Assistance (SGIA) program. This program tackles difficult policy issues, requiring a significant time investment for each project. EPA has found through working on SGIA that many communities struggle with the basic "building blocks" to lead to better development: the ability to identify needed changes in their policy or regulatory frameworks, to implement changes, and to build and sustain the political consensus needed for change. This need inspired the creation of the Building Blocks for Sustainable Communities Program to help the Agency develop more focused tools and approaches around narrowly defined subjects. These subjects, often referred to as tools in the context of this program, are designed to focus in depth on a particular development topic by taking real-time data from the community via a self-assessment, and then initiating a conversation with the community through an in-person

workshop. The end result of the technical assistance is a set of actionable steps the community can take, outlined through a Next Steps memo.

The effort outlined in this SOW will utilize the lessons learned from the first four rounds of Building Blocks assistance, as well as OSC's experiences working with communities through other efforts. The work outlined in this document will provide two workshops in each of the 10 EPA regions for two of the targeted MVD communities. Regions have pre-selected the communities and tools with which they'd like to work and pre-scoped the projects.¹ EPA regional staff has also gotten commitment from the communities that they will fulfill the requirements asked of communities in the "standard" building blocks TA process—meaning that these communities will commit to completing the self-assessment, participating in two to three conference calls, and providing all logistics for the workshop, including and site tour and invitations. Regional EPA staff will also take the lead on staffing these workshops.

This SOW will also help reach EPA Administrator McCarthy's goal of focusing the efforts of EPA around number of community-based topics. This SOW will provide tested tools to these 20 communities around the country that help fulfill these stated Administrator-level priorities—focusing primarily on issues related to equity, Environmental Justice, resilience and adaptation, green infrastructure, and reaching underserved populations. Tools offered during this assistance are:

- Creating Equitable Development
- Infill Development in Distressed Cities
- Green and Complete Streets
- Sustainable Strategies for Small Cities and Rural Areas

IV. PURPOSE AND OBJECTIVE:

Under this SOW, EPA will focus work with communities using existing tools to reach two primary goals:

The first goal is to provide direct, targeted information to each of the communities selected using a given tool, and to create a set of actionable steps that a community can take to further smart growth development and solve development challenges. These tools have been tested and refined through site visits to communities and through feedback with community representatives and EPA staff. They will be delivered to communities to help realize EPA Administrator McCarthy's goal of providing targeted, community-based assistance to 50 under-served communities around the country through the Making a Visible Difference effort, and through her stated agency-wide priorities.

¹ A full list of selected communities, tools and notes on each project is available in Appendix A.

This technical assistance will also help inform a second goal, which is to develop each tool into a standalone module that can be distributed to a wide audience in the form of a workbook. At the time of these deliveries, each of the four tools (listed above) shall contain the following components:

- Facilitator guide (aka "how-to" instructions)
- Agenda for call one/kick-off call
- Agenda for call two
- Facilitator agenda for workshop
- Sample invitation language for workshop
- Self-assessment (and instructions for completing it)
- PPT one (public meeting) and speaker notes
- PPT one (implementer meeting) and speaker notes
- Public engagement/participation exercise
- Sample next steps memo

These deliveries will be used to help further refine these materials to feed into the final tool workbooks. The development of the final workbook will NOT be part of this task order.

EPA will supply to the contractor all existing tool materials, which will be formatted uniformly between tools.

For purpose of the SOW, a tool is defined as a specific topic for which there is the body of materials listed above, formatted in a manner so that a group can have a facilitated discussion around a series of inputs and outputs. A tool is not just a series of presentations, but rather an action oriented process.

These tools are also meant to stimulate a dialogue about growth and development in communities while strengthening local capacity to implement smart growth approaches. EPA hopes that the result will be changes to local policies and procedures to better accommodate smart growth. This SOW will offer each EPA region their choice of one of the four tools listed. Communities will span the spectrum from rural to urban to tribal, and may be in places in which the EPA has not yet worked, or in communities where EPA has a past or current relationship.

This SOW will have three distinct elements:

(1) Work with EPA staff to educate and engage key community stakeholders in each of the ten EPA regions, as well as help EPA regional staff become knowledgeable and proficient in the building blocks process and topic areas. This will include minor edits to powerpoint presentations, logistical materials and any maps, graphics or renderings necessary. The tools included in this SOW will have been delivered recently through EPA Building Blocks for Sustainable Communities TA, and will have also been refined through that process.

(2) Prepare for, and administer, technical assistance to 20 communities. This shall include prep calls with EPA and the community, analysis of the community self-assessment, minor tailoring of the tool presentations, onsite workshops and follow-up calls.

(3) Create a next steps memo for EPA and the community after every site visit. This memo shall help communities capture the discussion and next steps discussed during the site visits, as well as assist EPA in measuring performance of program.

As a result of this task order, EPA will assist 20 communities tackle complex smart growth implementation issues. The implementation of these approaches can deliver the following environmental and community outcomes:

- expanded housing and transportation choices among households, particularly those earning below area median income;
- more balanced transportation systems that support walking, biking, and public transit, as well as driving;
- reduced VMT, resulting in lower greenhouse gas emissions, lower commuting costs, and decreased road congestion;
- efficient use of services and infrastructures, resulting in cost savings for the public;
- increased redevelopment of brownfields, as well as other underutilized infill locations;
- improved water quality through efforts that reduce stormwater runoff into existing waterways;
- reduced cost and energy intensity of stormwater management systems through increased use of green stormwater practices;
- increased focus on smart growth and environmental benefits for overburdened, underserved, historically underrepresented, and/or sensitive populations (including racial or socioeconomic minorities, the elderly, and/or children).
- more healthy and safe pedestrian walkways and streetscapes through use of street trees, swales, and other green infrastructure components; and
- reduced energy and water consumption and lower household energy costs through use of green building construction techniques and materials.

Finally, this work also helps support the HUD-DOT-EPA Partnership for Sustainable Communities. The Partnership seeks to align federal resources to support implementation of more sustainable, smart growth approaches to development challenges. Six livability principles have been developed to describe the types of communities which the Partnership seeks to support.² EPA will work with our federal partners in HUD and DOT—along with USDA—to implement our ongoing programs, including this technical assistance.

V. QUALITY ASSURANCE (QA) REQUIREMENTS

Check [] Yes if the following is required or [x] NO if the following is not required. The Contractor shall submit with their technical proposal a written Quality Assurance Project Plan for any project that is developing environmental measurements or a Quality Assurance Supplement to the Quality Management Plan for any project which generates environmental data using models.

² Read more about the Partnership and the six Livability Principles at <http://www.epa.gov/smartgrowth/partnership/index.html>

VI. TASKS AND DELIVERABLES:

The TO COR shall review all deliverables in draft form and provide revisions and/or comments to the contractor. The contractor shall incorporate the TO COR's comments 14 days after receipt of comments. Final deliverables shall be in MS Powerpoint, PDF and MS Word format.

Contractor personnel shall at all times identify themselves as Contractor employees and shall not present themselves as EPA employees. Furthermore, they shall not represent the views of the U.S. Government, EPA, or its employees. In addition, the Contractor shall not engage in inherently governmental activities, including but not limited to actual determination of EPA policy and preparation of documents on EPA letterhead.

From time to time, as new information develops, the contractor shall organize guidance calls with various experts for the purposes of scoping issues, confirming topics of research and methodological approaches, and making sure tasks and the overall project are on track and focusing on relevant topics and issues. Technical direction, when appropriate, will be provided by the TO COR.

Task One –Project Management and Scheduling

(Contract Reference: ILB. TECHNICAL ASSISTANCE Page 1-17 of 27)

For project management, the contractor shall organize and facilitate:

- Two to three one-hour call with the full team—the team including all relevant contractor and EPA staff—to discuss the objectives of the program and to discuss tool development and delivery.
- Four, one-hour tool calls (one/tool) with each of the four 'tool leads,' regional staff and the TOPO to discuss specifics of tool refinement, particularly in reference to specific community challenges in the 20 targeted communities.
- A weekly 45-minute call with the TOPO to review project progress.
- One, one-hour call with the full team near the end of the project to discuss project accomplishments and results.

The contractor shall prepare a tentative schedule for implementation of 20 community-based technical assistance site visits. The schedule shall include the following steps:

- Full team calls, tool refinement calls and weekly coordination calls.
- Up to three planning calls per community. Calls shall include participation of the contractor point of contact, the community point of contact, and a representative from EPA and any partner federal agencies. These calls should be scheduled six to ten weeks leading up to the workshop
- Draft tool materials/delivery approach for each of the site visits.
- One site visit per community, spanning one-and-a-half days. Sites visits shall not occur until EPA approves the tool materials.
- One follow-up meeting with each community. This meeting may happen on-site (in person)

- after the workshop, or via conference call at a later date.
- Delivery of one Next Steps memo for each community
- Delivery of “final” tools after all workshop deliveries are complete. Final tools shall contain any changes or modifications made as a result of the workshops.

The Contractor shall devise a schedule for completing all assistance to ten communities no later than December 31, 2015. The initial project schedule shall be developed within 14 days of executing the task order. The schedule shall be updated throughout the project as site visits are scheduled and Next Steps memos are submitted.

Task Two –Review and Finalize Workshop Materials

(Contract Reference: II.B. TECHNICAL ASSISTANCE Page 1-17 of 27)

The Contractor shall work with the TO COR and EPA regional staff to review and make minor edits to refine the existing tool materials designed for delivery in a one-and-a-half day site visit format. These tools are: Sustainable Strategies for Small Towns and Rural Areas, Infill Development for Distressed Cities, Creating Equitable Development, and Green and Complete Streets. EPA will provide the contractor with the tools in their existing format. For the Green and Complete Streets tool, additional formatting edits may be required to visually match to tool materials with the other four tools. A brief description of each tool is below.

Creating Equitable Development This tool will focus on a central question in the expansive subject of equitable development: how to achieve redevelopment and improve the quality of existing communities without unfairly displacing current residents. This workshop will show that if managed strategically, policy choices related to housing, transportation and environment can turn the economic and social opportunities that come with neighborhood revitalization, opportunities that sensitive populations are often excluded from, into something that benefits the existing resident community.

Sustainable Strategies for Small Towns and Rural Areas: This tool will focus on identifying hurdles to smart growth development in local development codes, programs, policies, zoning and initiatives. This tool is designed to meet the challenges of more rural areas, and will help rural places promote their community goals, sustainable and efficient development patterns, and further economic growth. This workshop will help participants understand the basic principles of smart growth and potential policy changes that could be adopted to promote vibrant communities that encourage investment in existing neighborhoods while preserving open space and rural character. This tool will draw on EPA’s Rural Smart Growth Self-Assessment to explore a number of topics unique to rural areas and small towns. Topics can include, among others:

- **Revitalize Village and Town Centers (mandatory)**
- Strengthen the Local Economy
- Engage and Connect Community Members
- Improve Health and Promote Active Living
- Protect Natural Habitats and Ecosystems

- Support Productive Agriculture for a Variety of Markets
- Meet Housing Needs for Different Ages and Incomes
- Preserve Historic and Cultural Resources
- Provide Transportation Choices
- Invest in Efficient Public Infrastructure Systems and Operations
- Use Energy Efficiently and Provide Renewable Energy

The presentations and discussions will focus on implementation issues and strategies drawing on experiences in other rural communities.

Infill Development for Distressed Cities: This tool is intended to help communities foster increased infill development by leading them through a process of assessing various tools and strategies and identifying those that have the highest likelihood of success. Through EPA's work in Fresno, California, EPA has developed a self-assessment that presents dozens of strategies that distressed communities can consider to foster infill development, along with conditions under which each strategy is most likely to succeed (e.g. financial, political, and geographic conditions, etc. This self-assessment helps identify which strategies may be most viable for a particular community, and the in-person stakeholder workshop then helps the community prioritize and form an implementation plan for carrying out the preferred strategies. The Infill Development tool is designed primarily to assist economically-distressed communities – loosely defined as those characterized by high unemployment and poverty, a weak real estate market, and/or severe municipal fiscal constraints that impede public financial support for infill development projects.

Green and Complete Streets –This tool showcases a range of national best practices for incorporating green and completes streets strategies for public areas in the street right-of-way. Communities will learn about green infrastructure elements such as street trees, rain gardens, and permeable paving. Communities will also learn how to develop interdepartmental cooperation, maintenance strategies, and funding mechanisms to implement and maintain green streets. These actions could result in reduced pollution, reduced flooding, increased green space, improved air quality, and reduced demand on a community's sewer collection system. Beyond the environmental benefits, green and complete streets strategies can also make the streets more pleasant for pedestrians and cyclists while still accommodating automobiles.

The contractor shall become familiar with these tools.³ Each tool shall have the following format:

- Facilitator guide (aka "how-to" instructions)
- Agenda for call one/kick-off call
- Agenda for call two
- Facilitator agenda for workshop
- Sample invitation language for workshop
- Community self-assessment (and instructions for completing it)
- PPT one (public meeting) and speaker notes
- PPT two (implementer meeting) and speaker notes

³ See Appendix B for sample tool materials.

- o Public engagement/participation exercise
- o Sample next steps memo

The materials for each tool shall include universal information and concepts that can be applied in any jurisdiction, as well as information focused toward the specific selected communities. Information on the specific communities will come from the two to three pre-workshop calls and the community self-assessment. The tools should provide information and policy advice along a place typology spectrum (urban, suburban and rural communities) and regional distribution.

The contractor shall review existing workshop materials for each existing tool, and propose any minor edits and tweaks that improve each tool based on the contractor's knowledge and expertise. EPA and the contractor shall have a conference call no more than seven days after EPA has reviewed the proposed changes to discuss edits and suggestions. The contractor shall finalize the tool by making improvements incorporating any feedback from EPA. The contractor shall deliver a proposed finalized set of tool materials (agenda, self-assessments, powerpoint files, etc) to EPA no later than 21 days prior to the first scheduled workshop for each of the tools. The final draft files shall be delivered with track changes or comment boxes. Any modifications shall be incorporated and provided to EPA no less than seven days prior to the workshops.

While EPA anticipates that these tools will be finalized prior to the site visits, if feasible, some minor revisions or changes might occur after the site visits. The decision to make such changes shall be based on two criteria: 1) a limited amount of effort (one to two hours per tool) required to make changes and 2) significant feedback from communities that something needs to change.

Task Three – Implement Pre-Workshop Calls with Communities, Analysis of Community Self-Assessment, Workshop and Next Steps Memo for All Communities
(Contract Reference: II.B. TECHNICAL ASSISTANCE Page 1-17 of 27)

The contractor shall identify qualified experts to work with each community. These experts should possess knowledge of the given tool, as well as expertise in leading workshop presentations and charettes. The primary delivery mechanism shall be a site visit that stretches over a one-and-a-half day period. While most community site visits shall take place in the one-and-a-half day period, the contractor shall assume in the workplan budget a full two day commitment to account for travel or scheduling issues, and for follow-up/debriefing time with the community after the meetings. The site visits shall be structured around a quick community tour, led by the community contact, and subsequent workshop sessions with key stakeholders. The brief reconnaissance tour shall be primarily aimed at identifying local examples relevant to the tool, getting an understanding of conditions on the ground, and taking pictures that can be integrated into the workshop presentations. This tour shall be led by local contacts, but should be discussed in advance to ensure that the project team—relevant contractor and EPA staff—is seeing relevant areas.

Pre-workshop Coordination

Coordination between the contractor, EPA and the communities shall include participating on at least two conference calls, but no more than three, with each community prior to the workshop. These calls shall ensure that EPA and the contractor have the sufficient information from each community to implement the technical assistance, much of which will be received through the baseline data each community will deliver in their self-assessment. The contractor shall also offer the community guidance on whom to invite to the workshop. This will depend on the specific tool and the specific community. For example, a workshop could be oriented primarily to local government staff, elected officials, local residents or a combination of all three. These calls shall also help facilitate workshop logistics and help develop relevant community background materials to ensure that the workshop is relevant to local conditions.

Customizing the Tools

The tool is set up to require only a minimal amount of prep time to customize its application in each community. The TO COR will provide the contractor with information on other EPA and partner federal agency investments and projects are taking place in the selected communities, which the contractor shall be expected to incorporate into workshop materials, when appropriate. The contractor shall plan to spend up to 30 hours of prep time for each community.

Scheduling Workshops

The TO COR will coordinate with the Contractor to schedule site visits with the communities once the kick-off call has occurred. The communities designated for this program will be selected by each EPA region. These communities are part of EPA's Making Visible Difference effort, and are predominantly recognized as underserved areas. Please see Appendix A for a full list of communities, tools selected and a brief project description.

Implementing Workshops

The workshop and tool materials shall be designed to move the community from an early stage of understanding about the selected tool topic, to a more advanced stage at which they have a clear understanding of how to implement next steps to further the given topic. Additionally, the tools are designed to help a community determine opportunities that may exist in their community to make progress. The workshop shall clearly illustrate the concepts embedded in the tool materials and provide a clear roadmap for how to move the concept forward in the community. The contractor shall facilitate the workshop, including analyzing the results of the self-assessment, and making presentations and/or leading group work during the workshop. EPA will supply all existing tool materials.

The contractor shall implement the site visit in a format corresponding to the materials developed in Task Two. With rare exception, these site visits shall require only one person from the contractor's staff to attend. A staff member from a regional EPA office will also attend the workshop. Additional EPA, HUD and/or DOT staff from headquarters or regional offices may attend these visits, when scheduling allows.

Within seven days of the workshop, the contractor shall provide EPA with a final set of workshop materials used in the site visit.

Next Steps Memo and Follow-up Meeting

Upon completion of each community-based workshop, the contractor shall conduct one debrief call with each community. This call shall also involve EPA and other federal staff, and is designed to discuss any remaining items from the workshop and to verbally discuss next steps for the community. The contractor shall also develop a brief "next steps" memo directed to the community (no more than eight pages in length) with a brief summary of the event, a list of next steps that the community may want to discuss further, and lessons learned, including specific actions for the community to consider based on the workshop results. A template will be provided by the TO COR. The memo shall be provided to EPA within seven days of each workshop. EPA will respond with comments within seven days, after which time a final memo shall be delivered to EPA within seven days. EPA will transmit this memo, along with all final workshop materials, to the community.